webTA

Employee Manual

User Guide

3i Systems, Inc.

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Definitions

ACCOUNTS
Any time in pay status must have an account code associated with it. The account code is the fiscal year, appropriation code, and cost code.

DEFAULT SCHEDULE
The default schedule is your basic tour-of-duty. This schedule can be loaded into every pay period's timecard, to lessen the amount of input needed.

DOLLAR TRANSACTIONS
Special Time in Pay transactions where a dollar amount is recorded and paid to you. Typically, this field will not be used.

ERROR MESSAGES
Messages generated during the validation process. Error messages are generated when webTA determines that the data entered is incorrect. The most common errors are when the daily, weekly, or pay period totals do not balance. You cannot validate a timecard if errors exist.

EXCEPTION PROCESSING
A type of processing where the default schedule is loaded into every pay period's timecard and only differences to the default need to be input to the timecard. webTA will automatically subtract the appropriate hours from the regular time on the default schedule.

LOCATOR INFORMATION
Provides a means of maintaining contact information for employees. Only email addresses must be listed in the Locator Info field. Your task messages will be sent to the email address listed in your Locator Info.

OTHER TIME
Non-pay time is listed under Other Time. Examples of Other Time are Leave Without Pay (LWOP), Absence Without Leave (AWOL), and Suspension.

PREFIX (PFX)
A code used to expand the definition for certain Time in Pay codes.

RESTORE FROM DEFAULT
A type of processing where the default schedule is loaded into every pay period's timecard, and only differences to the default need to be input to the timecard. You would also need to subtract the appropriate hours from the regular time on the default schedule.

STORED ACCOUNTING
A type of processing where your accounting information is stored in the NFC database. All time and attendance data will be charged to this account, without having to enter the account on the T&A.

SUFFIX (SFX)
A code used to expand the definition for certain Time in Pay codes. The suffix code is used to pay a wage grade employee his/her shift differential. For example, Wage Grade employees working second shift use suffix 2.

T&A DATA
The Time and Attendance report, also referred to as the "timecard." It is the basis for reporting your hours of work.

T&A PROFILE
The information on this screen identifies your basic payroll profile. It includes tour of duty, pay plan, service computation date, and leave category.

T&A DATA SUMMARY
A way to view all of your webTA data for the pay period. It shows your timecard information, T&A profile, leave balances, and on-line leave requests. You cannot enter any information on this form. Your supervisor will review the same form prior to certifying your timecard.

TASKS
Tasks are messages sent through Lotus Notes to the email address listed in your Locator Info. Tasks can be system generated (such as approval of leave requests) or employee generated (such as requesting your timekeeper to update your T&A profile).

TIME IN PAY (TIP)
Paid time is listed under Time in Pay. Examples of paid time are hours worked, annual leave, sick leave, and overtime. All Time in Pay must be charged to an account

VALIDATE
When you validate the timecard, you are stating that the information is correct. webTA checks the information against some pre-programmed edits. You may receive warning or error messages during the validation process. You cannot validate a timecard if errors exist. Warnings should be carefully considered to determine if further action is needed.

WARNING MESSAGES
Messages generated through the validation process. Warning messages are generated when the possibility of an error exists, but webTA does not have enough information to determine for sure that there is an error. The most common warning message is if leave is posted on the timecard, but there is no on-line leave request. Warnings should be carefully considered to determine if further action is needed.

Basics

There are a few things that you need to keep in mind while using webTA.

First, webTA is an internet or intranet based application that differs from other computer applications, such as MS Word or Excel. Some of the processing in webTA is done on your computer, and some is done on a server. Because of the way the internet works, there is not a constant connection between your computer and the server. So, when entering information in webTA, you must always tell the system that you want to save your work by clicking the appropriate button on the screen (usually the **Save** button).

If you use a web browser often, this system should be relatively simple to use. The biggest difference is that you should not use the **Forward** and **Back** buttons in your browser. You should use the navigation buttons within webTA, such as **Return**, **Save** and **Next**. If you do use the **Forward** or **Back** buttons, you risk losing data that you have entered.

Within a page, use your *Tab* key to move from one field to another or use your mouse to point to a field and click.

One of the most common functions you will do is enter time worked and leave used. All time should be entered as the number of hours, a colon, and the number of minutes (hh:mm). Minutes should be recorded in 15-minute increments (00, 15, 30 or 45). For example, 4 hours and 30 minutes would be entered as 4:30. To enter whole hours, you only need to enter the hours. You may also enter the number of hours, a period, and a decimal fraction. The system automatically converts time entered this way to the hours:minutes format and rounds the entry to the nearest 15 minute increment. For example, 2.5 is converted to 2:30 and 4.1 is converted to 4:00 (a tenth of an hour is 6 minutes so it is rounded down).

As you enter data, some checks (validations) are performed. If you enter data that webTA can identify as incorrect, an error message is displayed indicating what is causing the problem. The main validation process is done after all data is entered for a pay period. Once validated, the data may be certified correct by the supervisor.

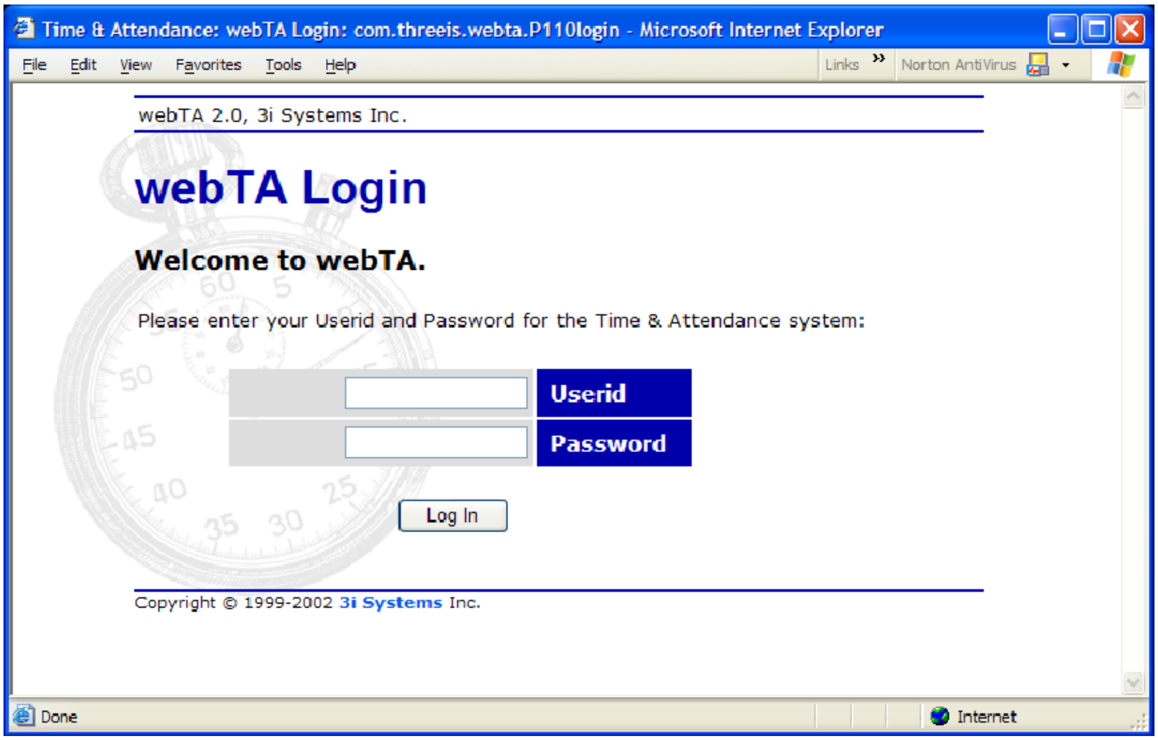
When you are done using webTA, you should properly exit the system by clicking the **Logout** button found at the top right of most screens. This ensures that data is properly saved and you are logged out of webTA. If there is no Logout button, you should complete the function you are using to get back to a menu or other screen with a Logout button.

webTA has a session timeout set on the server. If you leave webTA open and logged in for over 10 minutes, your session will expire and you will be logged out of the application. This is a security feature to prevent others from using your webTA account. If your session times out, simply log back into webTA to continue.

Logging In and Logging Out

To access webTA, click on the link to webTA on your customer page.

Access to webTA data is controlled by user IDs and passwords. Enter your user ID and password, and then click **Log In**. If your user ID and password are entered correctly, a *Main Menu* is displayed. Otherwise an error message pops up.

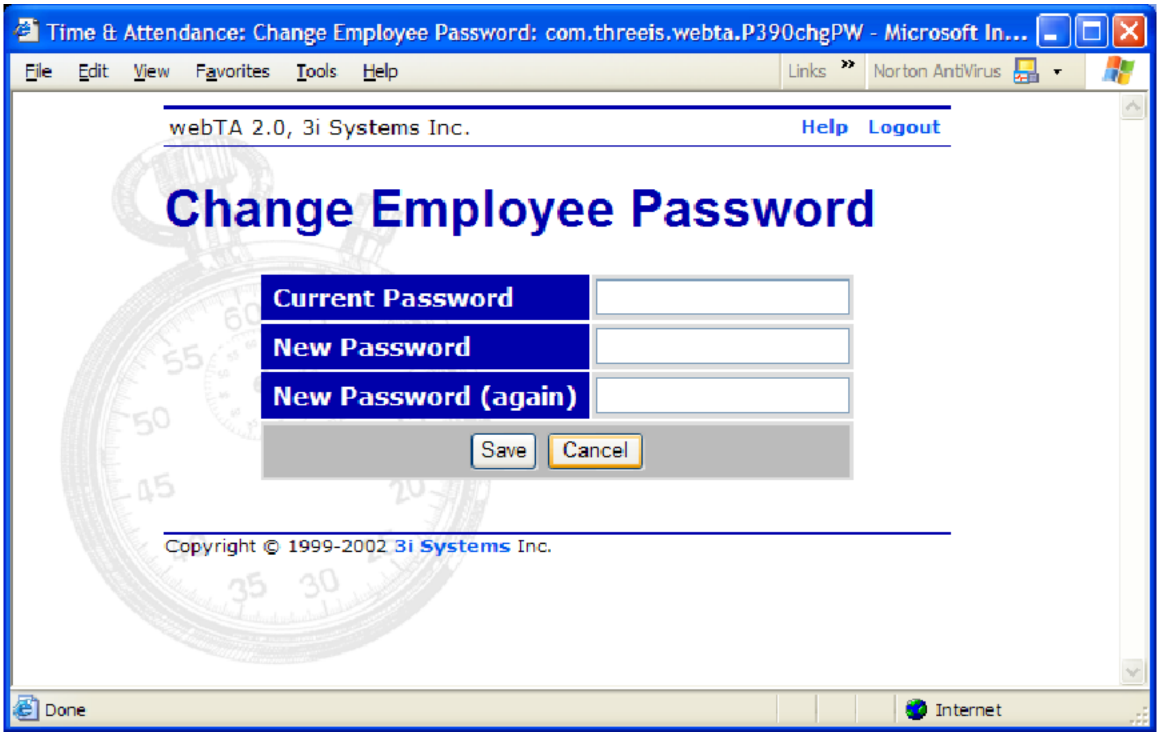


After three unsuccessful attempts to log into webTA, you will be locked out of the system and the Pay and Leave Staff must reset your password.

To end your webTA session you should log out of the application by clicking **Logout** in the upper right corner of the page. The **Logout** link is displayed on all pages other than the Login page.

Changing Your Password

To change your password within webTA, click **Change Password** on the *Main Menu* page. It is located in the *User Functions* section at the bottom of the page.



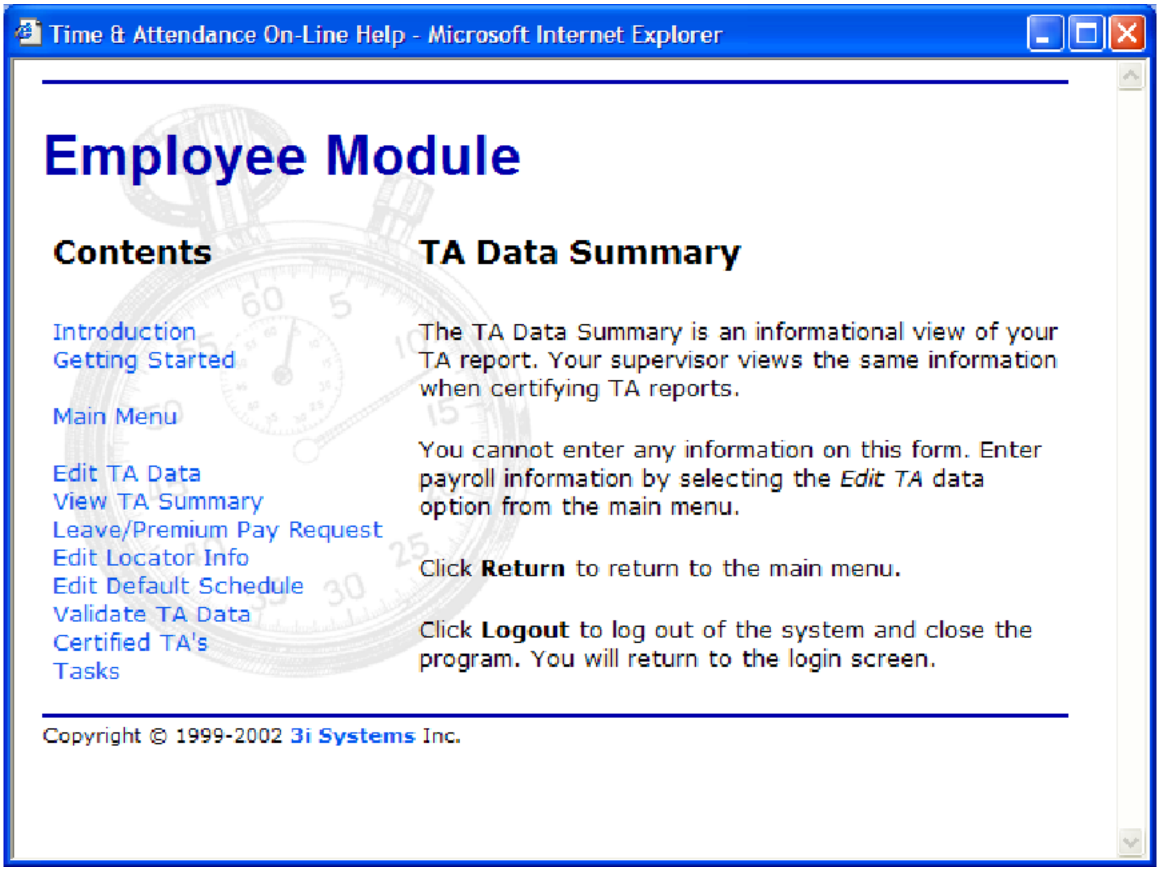
You should change your password on a regular basis, and you should never give your password to any other person. Passwords should not be easy to guess. Avoid your spouse's and children's names. The best passwords are random alphanumeric strings. Your webTA password must be at least 8 characters in length. It must contain an uppercase letter, a lowercase letter, a number, and a special character (%, $, &, etc.)

On the *Change Password* page, enter your current password. Then enter your new password twice, once in each of the fields provided, to verify that you did not make a typing error.

To save your new password, click **Save** and return to the *Main Menu*. Click **Cancel** to return without saving.

Online Help

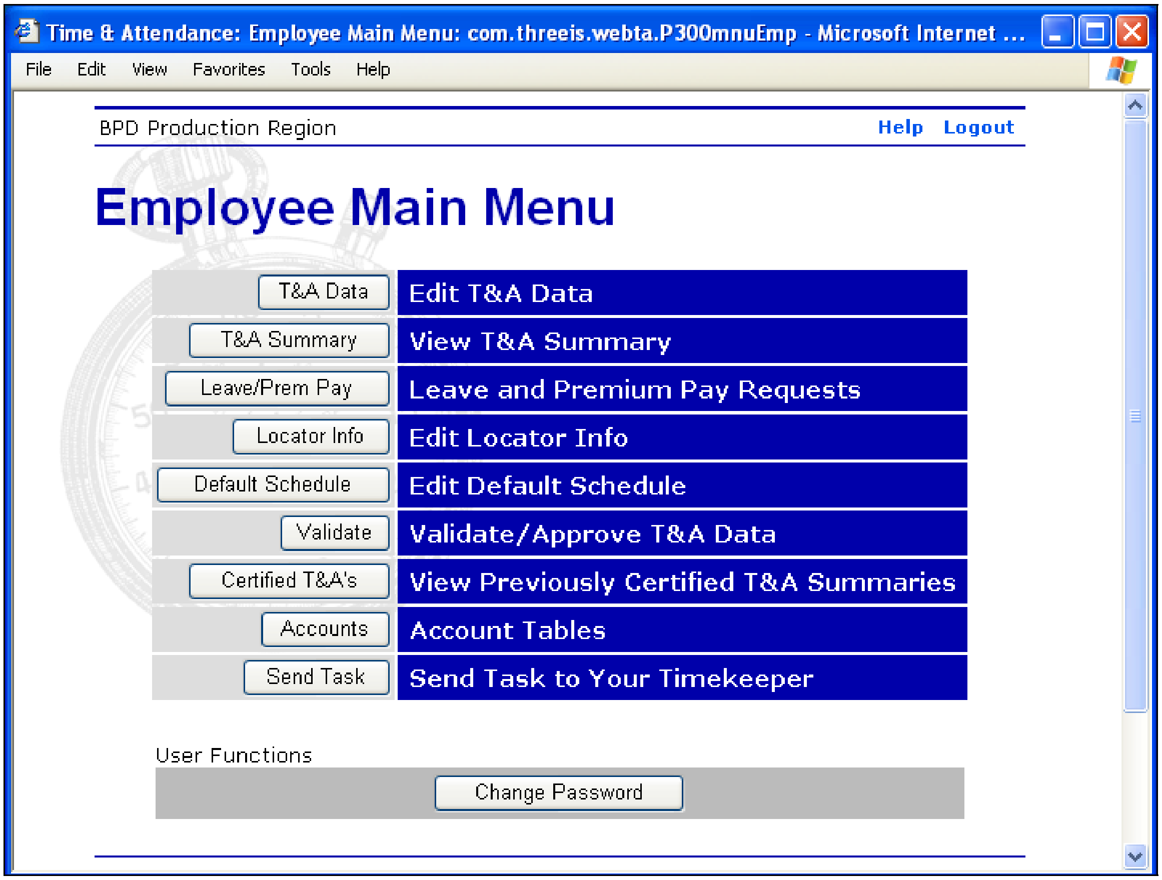
Throughout webTA, every page has an associated help page. If you need additional information about the page, simply click the **Help** link in the upper right corner of the window, next to the **Logout** link.



Help screens are displayed in a separate window from webTA. You can navigate the help screens using the contents links on the left side of the page. When you are finished viewing Help, simply close the help window.

Employee Module

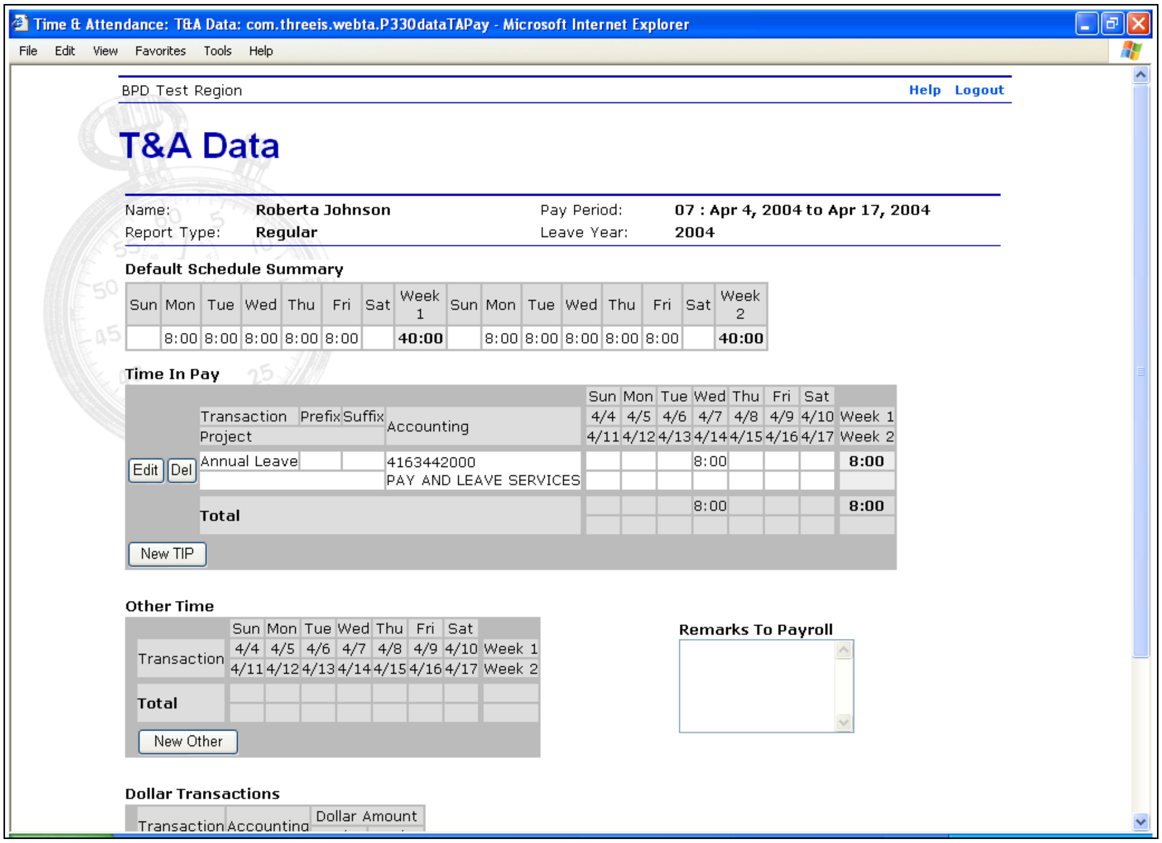
The *Employee Main Menu* provides access to the various functions that a typical employee would use.



You can enter hours worked and leave used to your T&A report and view a summary of the information. You may also submit leave or overtime requests; save your locator information; create or modify your default schedule; approve your timecard; view previous timecards; save new accounts; and, send tasks to your timekeeper.

Entering Your T&A Data

You should enter T&A data on a daily basis. To enter your T&A data, click **T&A Data** on the *Main Menu*. The *Payroll Data* page is displayed.



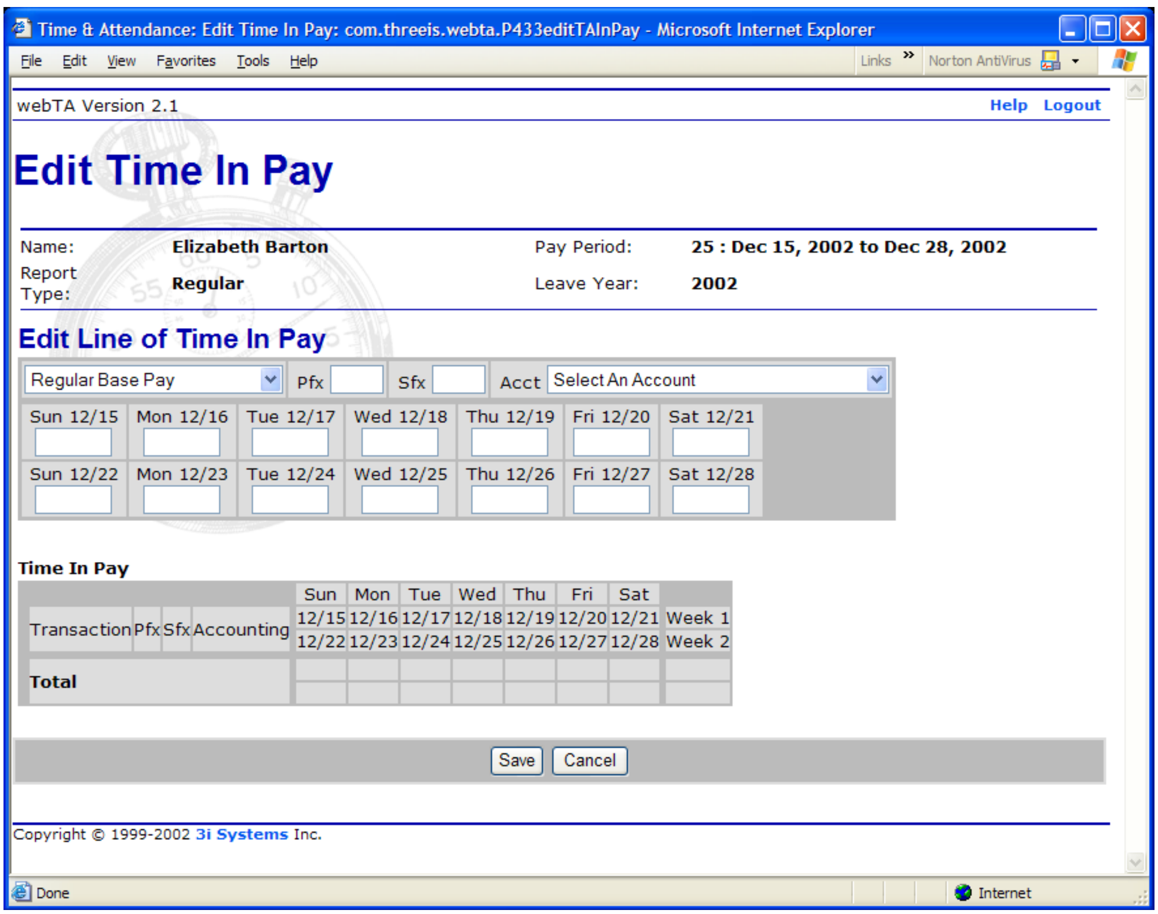
You may edit, delete or add lines to any of the sections of this page. To modify a line, click **Edit** next to the line you want to change. To delete a line, click **Del** next to the line. Note that as soon as you click **Del,** the line is permanently removed. You can only recover it by adding it again. To add a line, click **New** in the appropriate section.

Edit Time in Pay

All time in pay (TIP) must be charged to an account. Select the appropriate TIP, such as Regular Base Pay or Annual Leave, from the drop down menu in the upper left corner. If appropriate, record the suffix code. If your timekeeper has stored your accounting, you will not need to select an account. The Account field will show *NFC Stored Account.* If your timekeeper has not stored your accounting, you must select an account for the TIP.

Finally, enter the daily totals of time to charge to the TIP. The daily hours should be recorded as hours and minutes, in 15-minute increments. You should enter the number of hours, a colon, and the number of minutes (hh:mm).

You can instead enter the hours, a period, and a decimal fraction. If you enter time this way, it will be converted to hours and minutes, rounding to the nearest 15-minute increment. As an example, 3.5 is converted to 3:30.



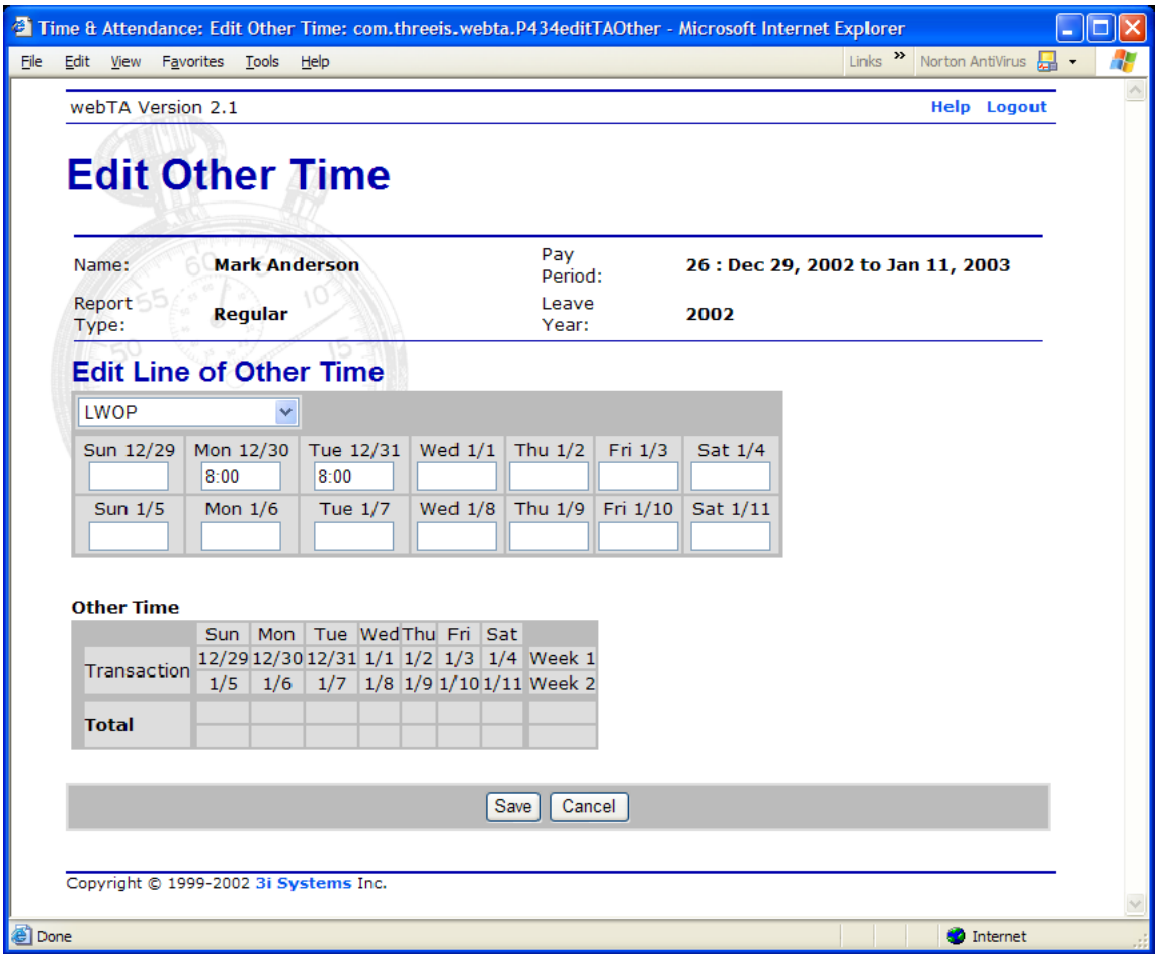
Once the time for the TIP has been completed, click **Save**.

Note: If you are an approved leave recipient, you will receive guidance from the Pay and Leave staff on entering data to the timecard.

Edit Other Time

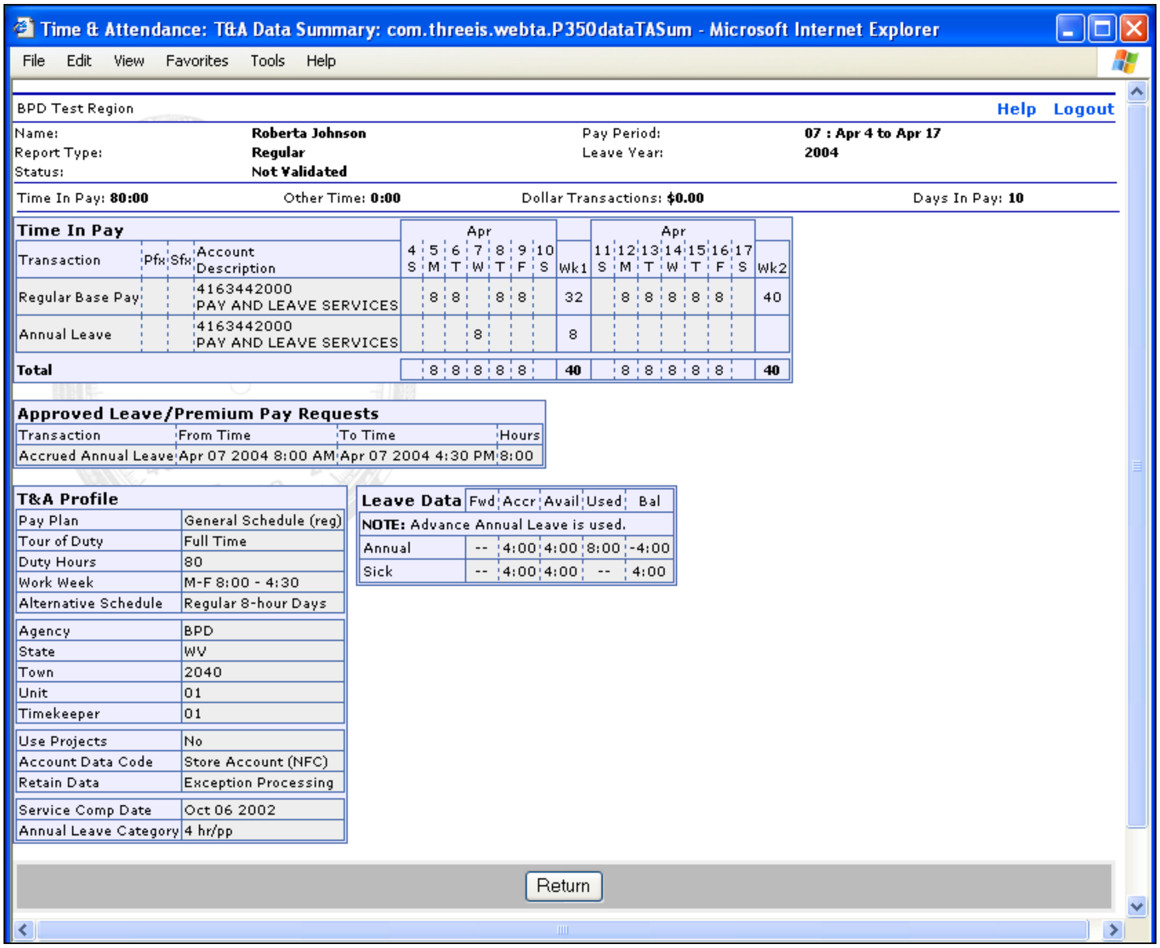
Non-pay time (Leave Without Pay, Absence Without Leave, Suspension) is entered under Other Time. Other Time is not charged to an account. So, this section includes only the type of time and daily totals.

As with the Time In Pay (TIP) above, daily time should be recorded as hours and minutes, in 15-minute increments. You should enter the number of hours, a colon, and the number of minutes (hh:mm).



T&A Data Summary Page

The T&A data summary page is displayed with your name and pay period at the top. The first section after the header is the timecard data. Following the timecard data are any approved leave requests, the T&A profile, and leave data information. Your timekeeper and supervisor will review this same form before your timecard is certified.


Time & Attendance: T&A Data Summary: com.threeis.webta.P350dataTASum - Microsoft Internet Explorer

File Edit View Favorites Tools Help

BPD Test Region — Help Logout

Name:	Roberta Johnson	Pay Period:	07 : Apr 4 to Apr 17
Report Type:	Regular	Leave Year:	2004
Status:	Not Validated		

Time In Pay: **80:00** Other Time: **0:00** Dollar Transactions: **$0.00** Days In Pay: **10**

Time In Pay

Transaction	Pfx	Sfx	Account Description	Apr 4 S	5 M	6 T	7 W	8 T	9 F	10 S	Wk1	Apr 11 S	12 M	13 T	14 W	15 T	16 F	17 S	Wk2
Regular Base Pay			4163442000 PAY AND LEAVE SERVICES		8	8		8	8		32		8	8	8	8	8		40
Annual Leave			4163442000 PAY AND LEAVE SERVICES				8				8								
Total					8	8	8	8	8		**40**		8	8	8	8	8		**40**

Approved Leave/Premium Pay Requests

Transaction	From Time	To Time	Hours
Accrued Annual Leave	Apr 07 2004 8:00 AM	Apr 07 2004 4:30 PM	8:00

T&A Profile

Pay Plan	General Schedule (reg)
Tour of Duty	Full Time
Duty Hours	80
Work Week	M-F 8:00 - 4:30
Alternative Schedule	Regular 8-hour Days
Agency	BPD
State	WV
Town	2040
Unit	01
Timekeeper	01
Use Projects	No
Account Data Code	Store Account (NFC)
Retain Data	Exception Processing
Service Comp Date	Oct 06 2002
Annual Leave Category	4 hr/pp

Leave Data

NOTE: Advance Annual Leave is used.

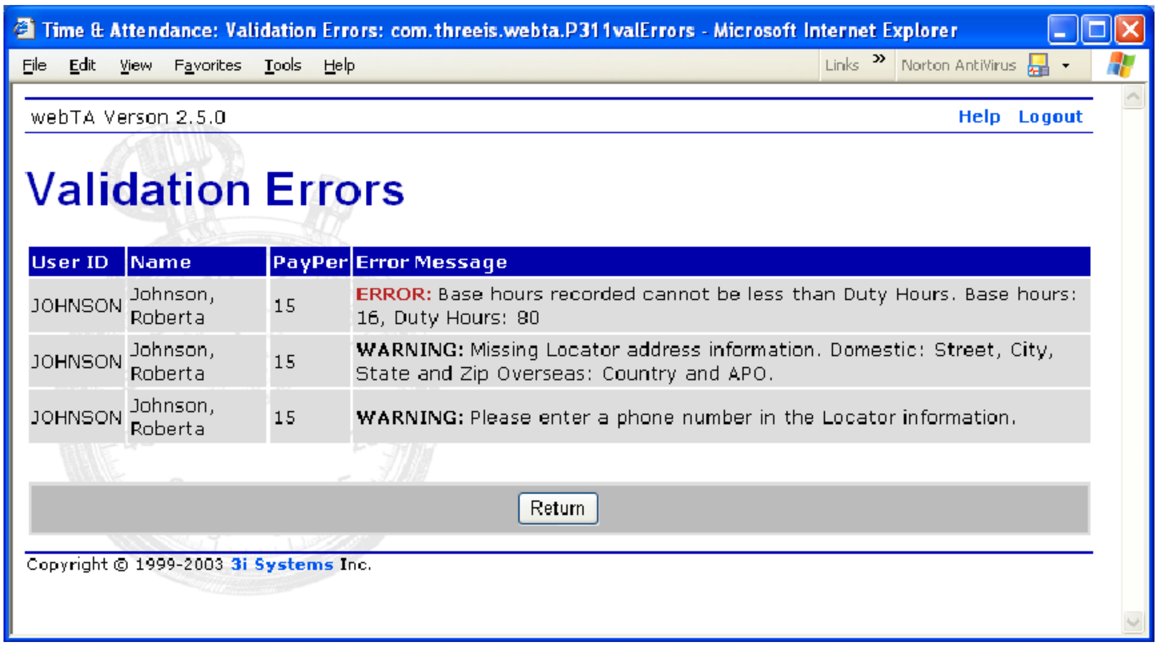
Leave Data	Fwd	Accr	Avail	Used	Bal
Annual	--	4:00	4:00	8:00	-4:00
Sick	--	4:00	4:00	--	4:00

Return

Validate/Approve T&A Data

Once you have completed entry of your T&A data for the pay period, you should validate it. After you have validated it, your timekeeper will review the summary page to ensure accuracy. Your timekeeper will also validate the timecard. Your supervisor cannot certify the data until it has been validated. By validating the data, you are stating that the data is correct.

When you click *Validate* webTA checks the data for errors and possible problems. Examples of error and warning messages are shown in the figure below.

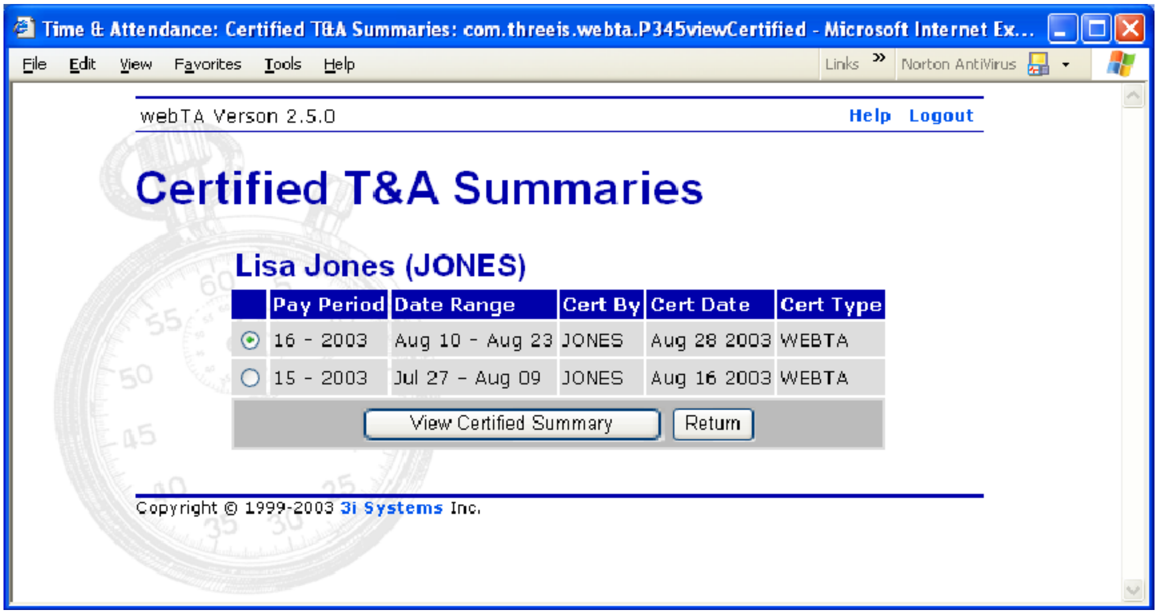


All **errors** must be corrected before the timecard can be validated. **Warnings** are generated when the possibility of an error exists, but webTA cannot determine for sure that there is an error. Warnings should be carefully considered to determine if further action is needed.

If no error or warning messages are encountered, you will get a message indicating that the data was validated. If only warning messages are generated, you will see the warning messages, and the data will also be validated.

Certified T&As

You can review T&As for previous pay periods. You cannot change the data, but you can review it. Click **Certified T&As** on the main menu.



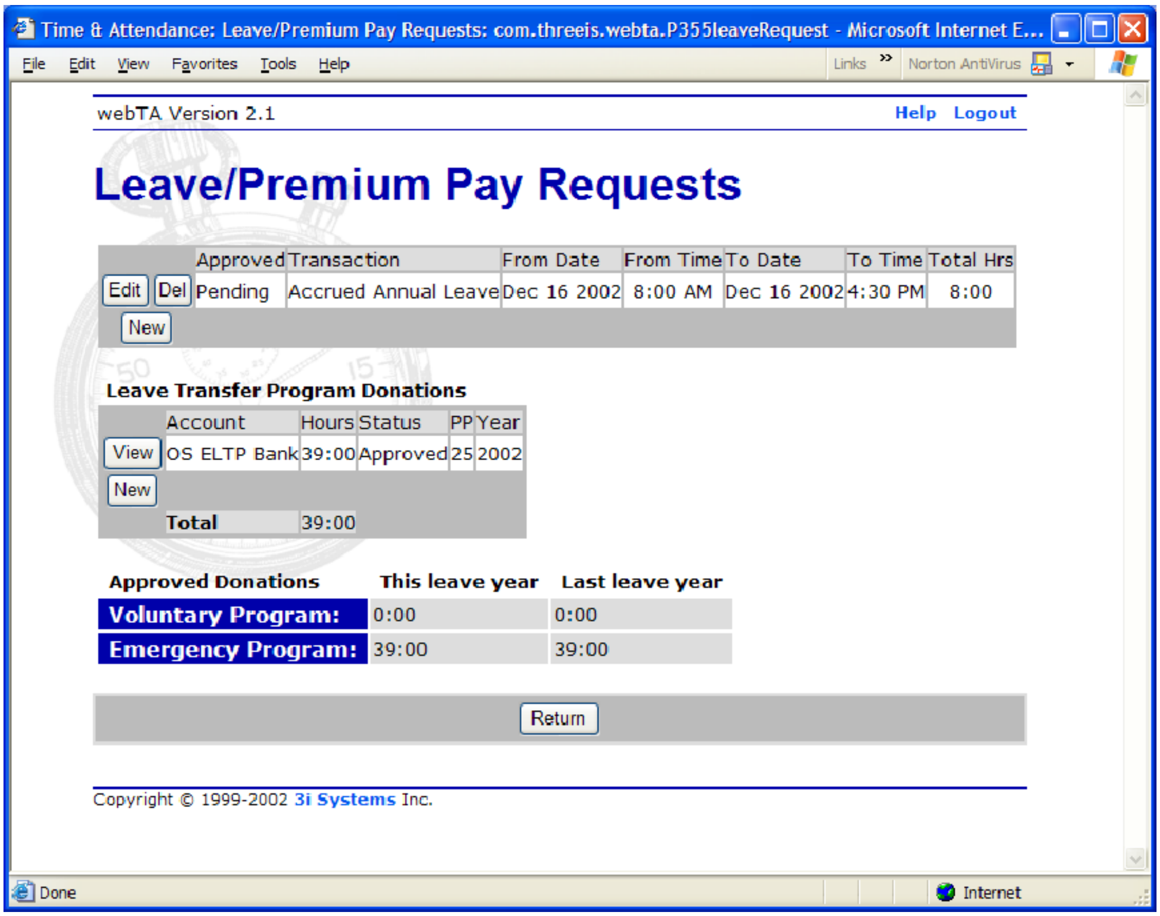
The certified T&As are sorted by pay period and leave year, with the most recent records at the top of the form. Simply select the one you want to view by clicking the radio button next to it. Then click *View Certified Summary*. A new browser window pops up with the summary form. When you have finished reviewing it, close the browser window.

Leave and Premium Pay Requests

Leave Requests

Click **Leave/Prem Pay** to review your active leave requests or to submit a new one. The page that is displayed shows all current and future leave requests that you have submitted with their current approval status.

- Pending – A leave request that has not been approved or denied.
- Yes – A leave request that has been approved.
- No – A leave request that has been denied.

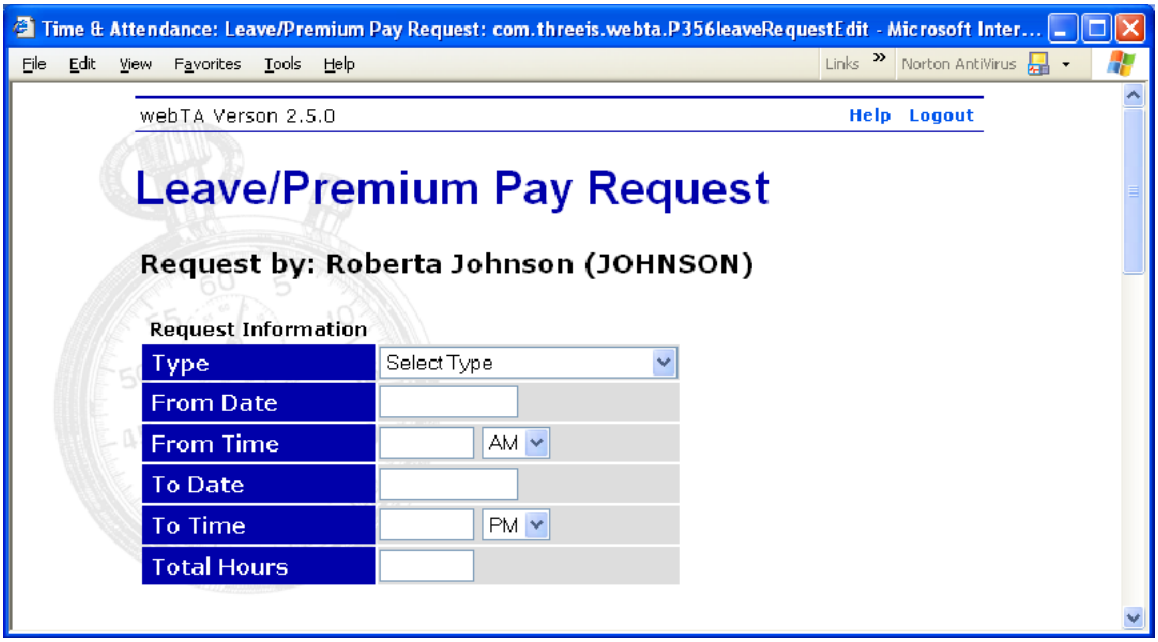


You cannot change leave requests that have been approved or denied, but a request that is pending can be changed. To change a pending leave request, click **Edit** next to the request. To view an approved or denied leave request, click **View** next to the request. To submit a new request click **New**.

When you are finished reviewing requests, click **Return** to go back to the *Employee Main Menu*.

Employee Leave/Premium Pay Request Page

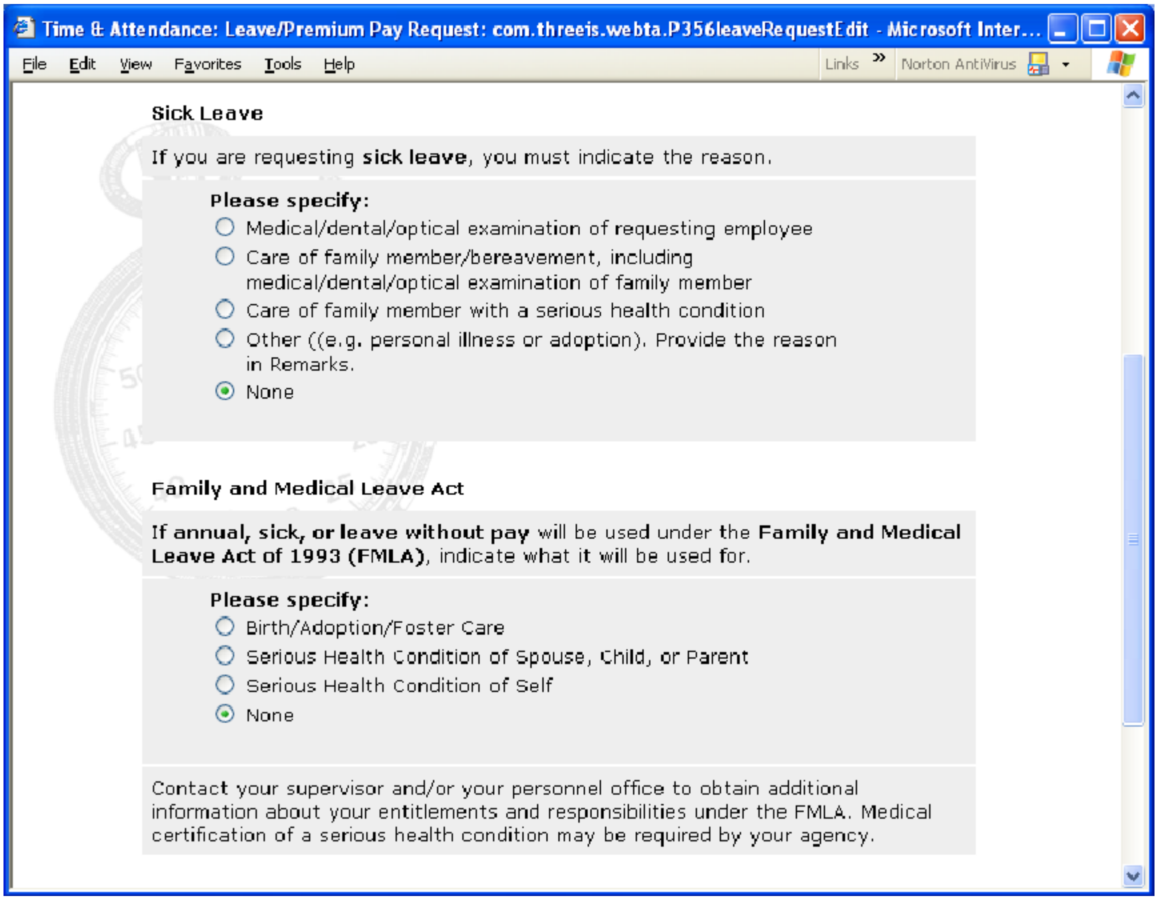
To submit a new leave request, click **New** on the Leave/Premium Pay Requests page. You will then see the screen below. This screen includes a block at the top with the types of request, dates, times and total hours requested.



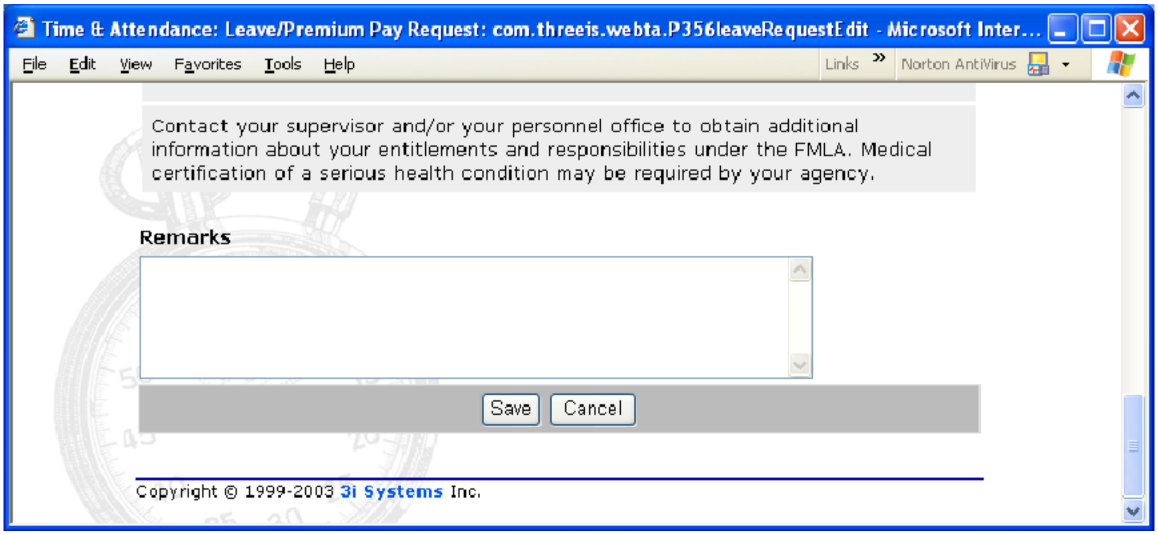
You must select a type of leave from the list. Then you must enter the starting date and time and ending date and time for the request. Dates can be entered in several formats, but you must use a 4-digit year. If webTA cannot translate the format of the date you entered, it will display an error message that shows the correct format. The times must be entered as the hour, a colon, the minutes (hh:mm). Then select AM or PM. You must enter the total number of hours of leave that you are requesting.

Family and Medical Leave Act (FMLA) and Sick Leave

For some types of leave, you need to indicate what the leave is for. In particular, sick leave and leave used under the Family and Medical Leave Act (FMLA) require identification of the purpose of the leave. Simply click the radio button next to the appropriate responses.



Finally, you may enter remarks in the text box provided. The remarks are visible to the supervisor approving the request. The supervisor may also enter remarks.



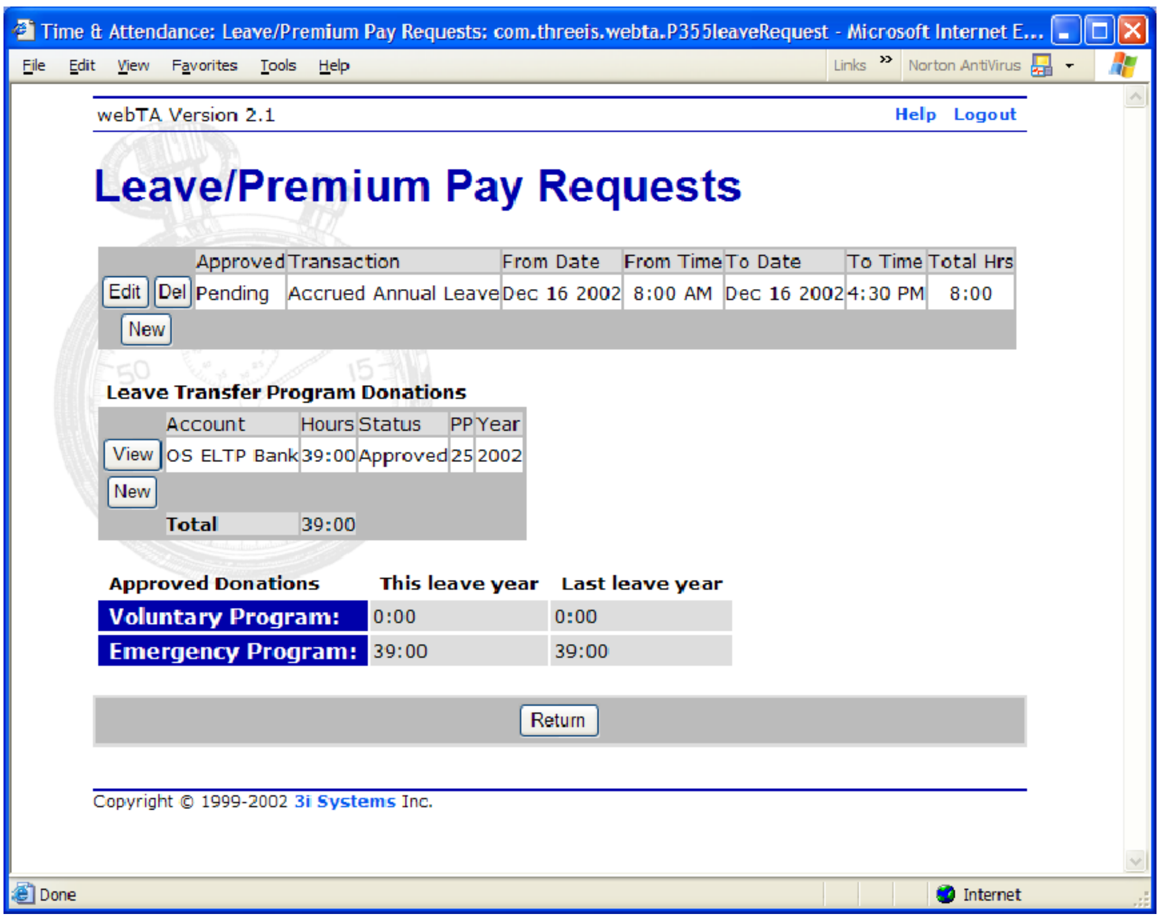
When you click **Save,** the form is checked for completion and errors are identified. You must correct the errors before you can save the form.

If the form has already been approved or denied, there is a **Return** button. When you have finished viewing or editing the form, click the appropriate button to return to the list of leave requests.

Making Leave Donations

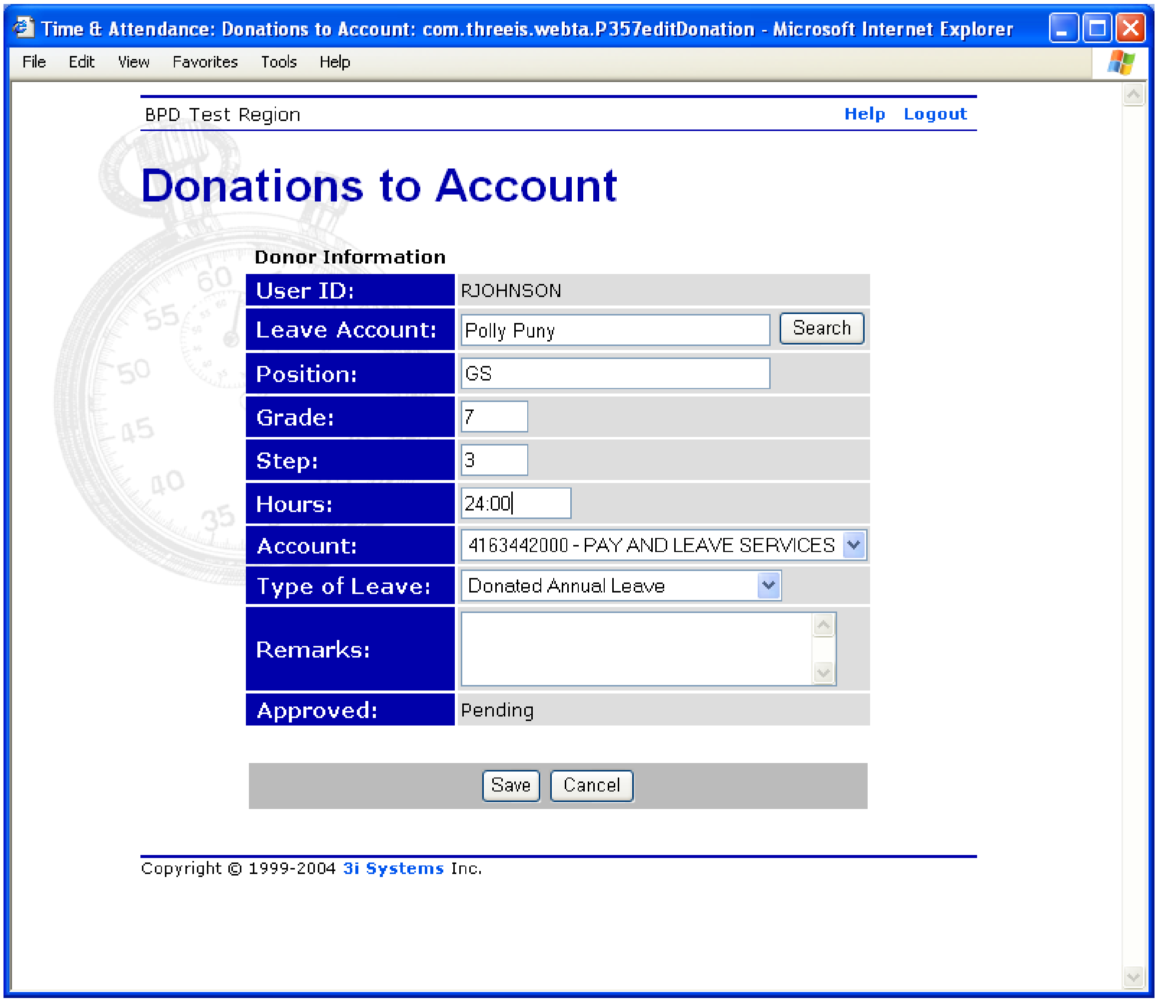
Leave donations may be made at any time to approved leave recipients in the Leave Transfer Program, as long as you have enough leave available and you have not exceeded the limitations on donations. To create a leave donation, click **Leave/Prem Pay** from the Employee Main Menu. The page that is displayed (see below) shows all current and future leave requests, then a summary of donations you have made to the Leave Transfer Program.

If you have active donations, they are displayed. Once a donation is approved, you cannot modify it. If it has not yet been approved, you may click **Edit** and make changes. Once approved, there is a **View** button that you can use to see the donation, but you cannot modify it.



Donations To Account

You can create a leave donation by clicking **New Donation** in the *Leave Transfer Program Donations* section. You will see the screen below. This screen captures all of the information required for making a leave donation. You must fill in all the fields on the form before saving it.



If you know the name of the leave recipient you are donating to, you may simply type it in the *Leave Account* field. If you do not know the specific name, you may click **Search** to find it.

The position, grade and step fields are required for agency reporting purposes.

As with your T&A, if your timekeeper has stored your accounting, you will not need to select an account. The account field will show *NFC Stored Account*. If your timekeeper has not stored your accounting, you must select an account for the donation.

The type of leave being donated must be selected. It may only be annual leave or restored annual leave. webTA will not permit you to donate more leave than you have available.

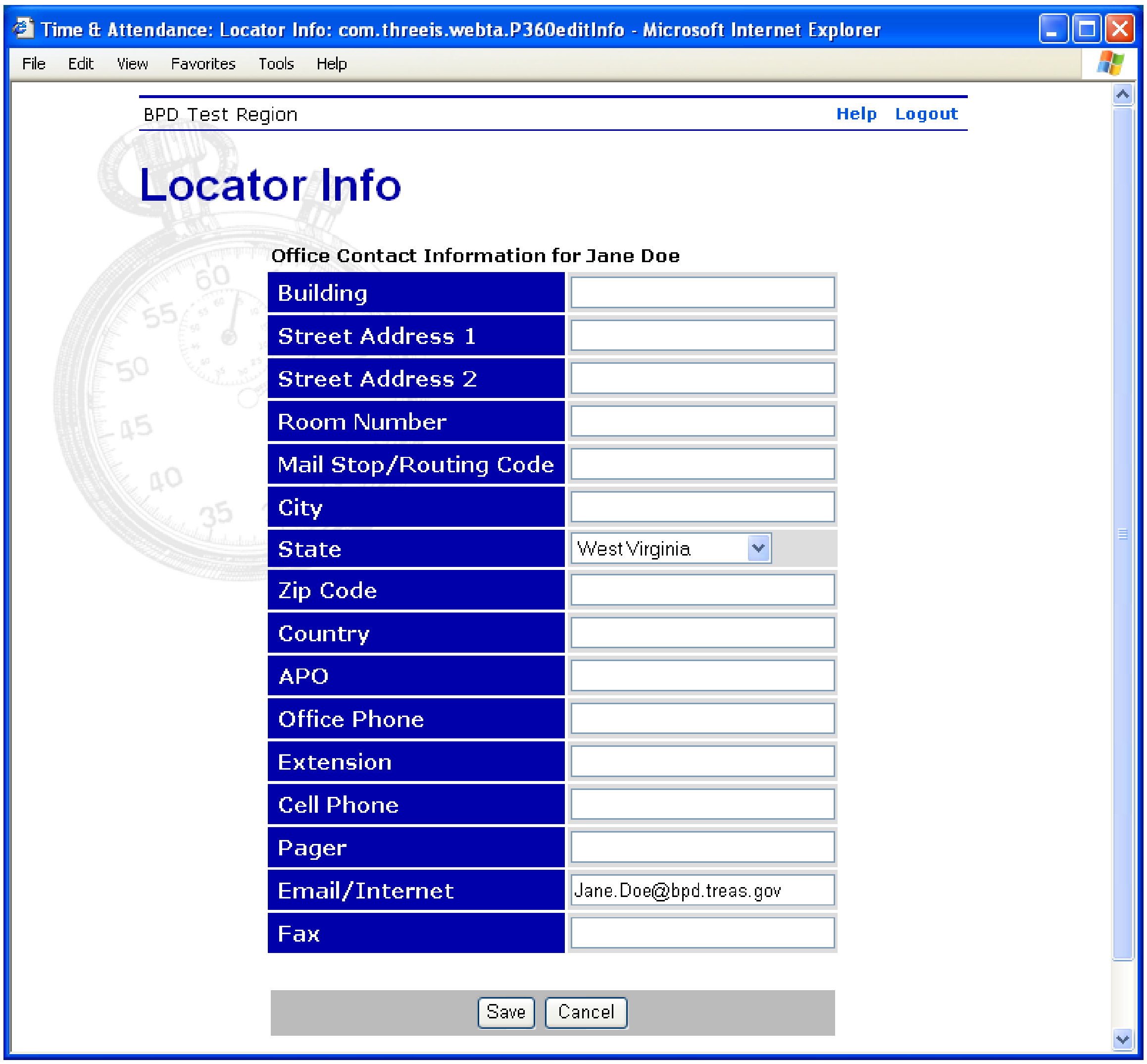
The status of the donation is *Pending* until it is approved by the Pay and Leave staff. Once the donation is approved, it is noted on your T&A report, and the leave is deducted from your leave balance.

Click **Save** to save the donation and return to the Main Menu or click **Cancel** to return without saving.

Locator Information

webTA is configured to send task notifications (such as approval of leave requests) through email. webTA will use the email address saved in the webTA Locator for any tasks sent to you. The only information required in the webTA Locator is the email address.

To enter your email address, click **Locator Info** from the Employee Main Menu. The screen below is displayed. Enter your email address in the Email/Internet field, then click **Save**.



Account Tables

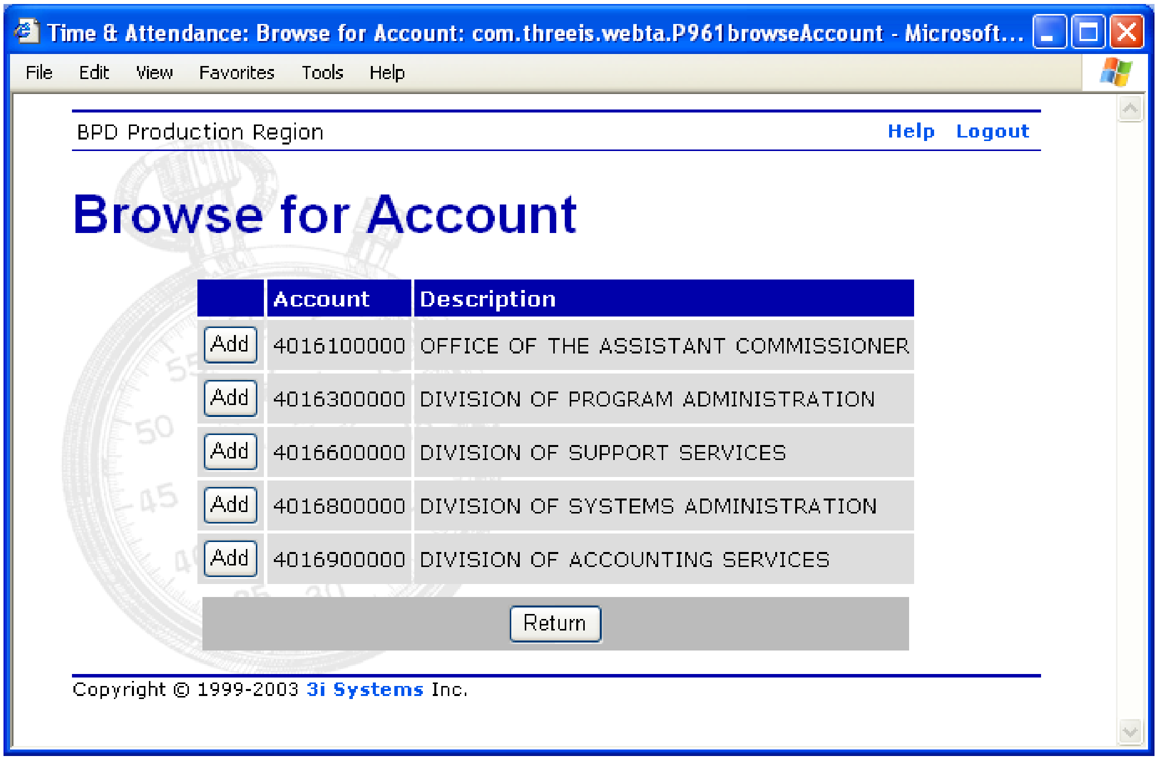
Your timekeeper will establish a default list of accounts that you can charge to. If you need to charge to additional accounts, you can add them to your personal account table. You cannot create new accounts.

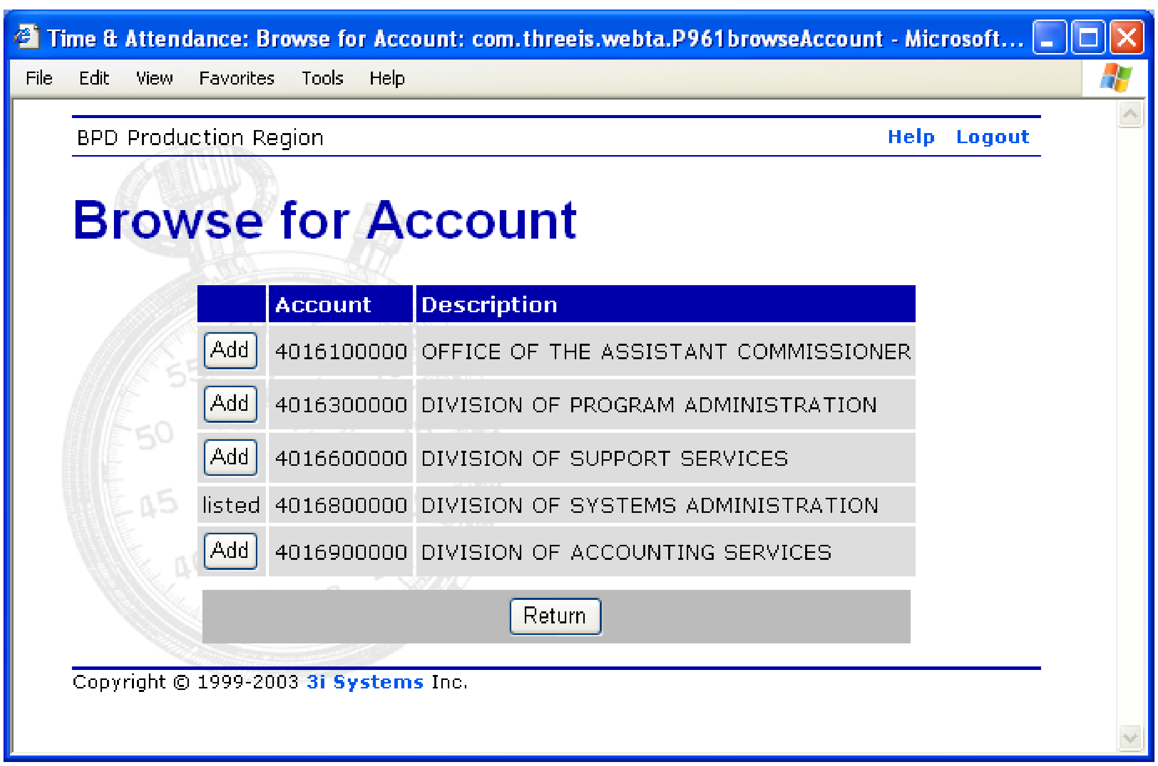
To add new accounts to your personal table, click on **Accounts** from the Employee Main Menu. The screen below is displayed. Click **Add Account** to search for the accounts you want to add.

When you click **Add Account**, the screen below is displayed. Click **Find** under fiscal year 2004. webTA displays a list of all accounts for fiscal year 2004.

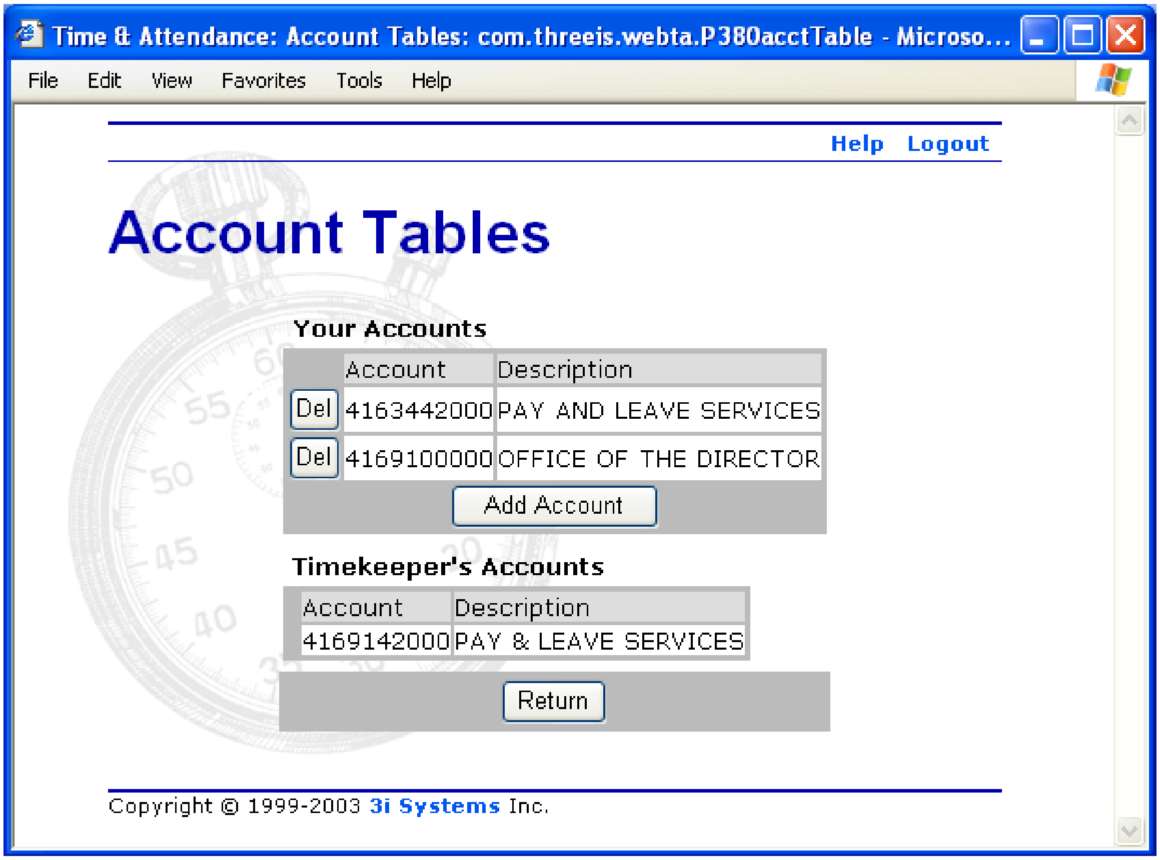
You can narrow the list of accounts by filling in part of the *Required* field before clicking on **Find**. In the example below, webTA will display accounts for fiscal year 2004, with an appropriation code of 01 and cost codes beginning with the number 6.

Once you click on **Find**, a screen similar to the one below is displayed. To add an account to your personal account table, simply click **Add** next to the appropriate account. The *Add* button will change to *Listed*. When you have finished adding accounts, click **Return**.





You can also delete accounts from your personal account table. Click on **Accounts** from the Employee Main Menu to display the screen below. Click **Del** next to the account you want to remove. You cannot remove the accounts in your timekeeper's account table.



Timekeeper Tasks

If you need your timekeeper to update information that you do not have access to, you can enter a timekeeper task message. The message you enter is sent to your timekeeper through email.

Click on **Send Task** from the Employee Main Menu. The screen below is displayed. Type in the message and click **Save**.